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SUBJECT: The Japan Economic Scope--January 10, 2008

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PLANES, TRAINS AND AUTOMOBILES

13. (SBU) Japan's Auto Sales Hit 25-year Low in a Shrinking Domestic Market

Japanese automakers' success abroad is tempered by a shrinking market at home, where auto sales fell to their lowest level in 25 years. In addition to rising fuel costs and demographic factors, Japanese new car sales have been hurt by increasingly durable vehicles and consumer preferences moving away from owning cars. Analysts predict a dramatically smaller Japanese auto market in the long term, eventually shrinking by as much as an additional 40 percent.

The Toyota Group led the Japanese market with a 42.2 percent share in 2007 (Nissan was second at 13.7 percent) but is

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actively working toward a future in which it diversifies into areas like robots and modular homes to decrease its reliance on auto sales.

In 2007, imports made up about 7.6 percent of sales, up slightly from last year, although total sales of American branded cars were just over 18,000 for a combined market share of under 0.4 percent. See Nagoya 0003 attached for additional details. (NAGOYA: Dan Rochman)

14. (SBU) Aviation--A Change of Pressure?

What is going on in the Japanese aviation world? Judging from press reports and the mood we detected at Japan Airlines (JAL), possibly something significant.

The Transportation Ministry (MLIT) may be slowly moving away from its traditional role as JAL protector, with the airline's opposition to liberalization losing backers. It is still too early to draw any firm conclusions, but for additional details please see Tokyo 0024. (ECON: Charlotte Crouch)

15. (SBU) Local Governments Accept Change in Itami Airport Classification (SBU)

Despite strong local opposition to a Transportation Ministry (MLIT) downgrade of Itami Airport (ITM), Osaka and Hyogo Prefectural Governments and several city governments around the airport stated they would accept the changes to the airport's classification.

By downgrading Itami, local governments will be forced to bear a part of airport maintenance costs, currently offset 100 percent by the GOJ.

Hyogo Governor Toshizo Ido saw the change as inevitable. MLIT is proposing that Osaka and Hyogo (both financially distressed already), pay one third of the annual cost of three billion yen (\$26 million).

Negotiations between the two prefectures and the central government on the proportion of cost-sharing are certain to heat up soon. (Osaka-Kobe: Phil Cummings/Naomi Shibui)

16. (SBU) Narita Airport Authority Invites USO

In an unexpected turn of events, the Narita Airport Authority called U.S. Forces Japan (USFJ) January 7 and offered a possible rental space for a USO lounge at the airport.

This invitation was surprising because, during a December 3 meeting, airport executives explained to USFJ officials that providing space for a lounge would be impossible.

The civilian airport, they had said, could not accommodate anything military in nature. (ECON: Charlotte Crouch)

17. (SBU) KIAC Aims For Complete Privatization

According to local press reports, Kansai International Airport Co. (KIAC) President Atsushi Murayama said KIAC aims to be completely privatized by 2014 by buying back government held stocks. The Japanese government and local governments-- primarily Osaka Prefecture -- currently own two-thirds of KIAC's stocks.

Murayama said the airport plans to sell the airport access bridge to the central government for 80 billion yen (\$695 million) to help buy back shares.

The Transportation Ministry (MLIT) would allot road money in the special account for the buyout, and has begun negotiating with the Ministry of Finance. Izumisano City, where the bridge is located, opposes turning the airport bridge over to the central government, fearing it will lose 800 million yen worth of property tax revenues.

Murayama also announced plans to expand duty free shops and other luxury stores at Kansai International Airport, which at present comprise some 60 percent of KIAC's total revenues. Airport authorities also plan to build a terminal building on

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the 2nd runway by 2010.

Murayama noted improvement in declining U.S. flights from KIX now that the airport expects Eva Airways and China Airlines from Taiwan to open Taipei--KIX--U.S. routes. (Osaka-Kobe: Phil Cummings / Naomi Shibui)

18. (U) Japan Railway East, Aeon Team Up for Train Station Shopping Malls

TOKYO (Nikkei)--East Japan Railway Co. and major supermarket chain Aeon Co. are moving toward an agreement to develop and manage shopping malls at train stations, according to a January 4 Nikkei article.

East Japan Railway, better known as JR East, currently operates around 120 shopping malls, most of which are located inside train station buildings. Sales by tenants at these facilities came to roughly a trillion yen in fiscal 2006--a major source of rail revenue, executives told us.

But while shopping malls at train stations in the Tokyo metropolitan area have been doing well, those in rural cities have been struggling to boost sales.

By tapping the Aeon group's know-how, JR East will likely be able to help the shopping malls revitalize their businesses. (ECON: Charlotte Crouch)

WHALING

¶9. (U) Three Japanese Companies Stop Canning Whale Meat

The Hokkaido Shimbun newspaper reported in late December that three of Japan's major fish processing companies, Maruha Group (formerly Taiyo), Nippon Suisan and Kyokuyo, all ceased production of canned whale meat products in 2007. Maruha Group and Nippon Suisan both closed down whale production lines at their Kushiro, Hokkaido canneries while Kyokuyo stopped canning whale at facilities elsewhere in Japan.

After whale meat became available as a "byproduct" of research whaling in 1987, the three firms established a private company called Kyodo Senpaku to sell and distribute whale meat. In 2007, they stopped canning whale meat in June and voluntarily gave away all of their stock holdings in Kyodo Senpaku to six other foundations, completely removing themselves from the sale of whale meat.

Maruha Group, Nippon Suisan and Kyokuyo all do business internationally. While they did not offer specific reasons for doing so, the newspaper speculated that the fish processing companies decided to get out of the whale meat market due to continued international opposition to Japan's research whaling.

Commercial sales of whale meat fund an estimated 90 percent of the budget for Japan's research whaling program. It is unclear what impact ending these three product lines will have on the whale meat market.

Smaller local fish processing plants in the Kushiro area continue to produce whale meat products, and Kushiro continues to highlight its whaling culture as part of the city's tourism promotion strategy.

Over the New Year holiday, local supermarkets across Hokkaido also attempted to market whale meat as an expensive specialty cuisine for use in seasonal dishes. (Sapporo: Ian Hillman/Yumi Baba)

END OF AN ERA

¶10. (U) Tokyo Stock Exchange President Saito Warns Investment is "Fleeing" Japan

Tokyo Stock Exchange President Atsushi Saito in a series of high profile interviews over the New Year's holiday warned that Japan's equity markets are losing out in the competition for

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global investment flows.

Saito's comments were reinforced by the sharp declines in both the benchmark Nikkei 225 and Topix indexes in the first two trading days of 2008, continuing a losing streak that started back on December 27. Tokyo was also one of only two major global stock markets (the other was Italy's) that ended 2007 in negative territory.

In an interview with Nikkei published January 6, Saito warned "Japan at the moment is not a place where overseas investors are willing to invest."

Saito said Japanese managers and directors must overcome their wariness about foreign takeovers as foreign financial institutions are now important players in Tokyo's markets. "Investing in a company is a way of showing that one rates a firm highly," he said, and "Japanese corporations with high proportions of foreign ownership are all top-notch entities." Although the widely publicized policy discussion about turning Tokyo into an international financial center, "has all been talk so far, with few concrete actions taken", Japan's financial sector needs to become stronger so it can replace manufacturing as a pillar of Japan's domestic economy. (ECON: David DiGiovanna)

¶11. (SBU) Potshots at Reform

In a January 8 editorial, the Japan Agricultural News railed against the Council on Economic and Fiscal Policy (CEFP), the key institution former Prime Minister Koizumi used to advance economic reforms.

Attributing the Liberal Democratic Party's (LDP) loss in the July Upper House election to "reforms which had brought disparity and poverty," the newspaper urged the small People's New Party (PNP)--known for its opposition to Koizumi's signature postal privatization--to submit a bill to abolish the CEFP.

The PNP has not approached the opposition Democratic Party of Japan (DPJ) to cooperate on the bill, according to DPJ contacts. Nonetheless, some within the DPJ are sympathetic, viewing the CEFP as having too much power for an unelected body.

Given the LDP's control of the Lower House, there is little chance a bill to abolish the CEFP would pass, but the editorial attack on CEFP as an engine of change is significant, as it marks a new stridency in anti-reform rhetoric. (ECON: Marc Dillard)

¶12. (SBU) Japan's Leftward Shift

Japanese politics have shifted towards bigger government and a greater emphasis on redistributive policies, the Asahi newspaper argued in a graphic it published January 8.

The shift, which can be seen in the recent political themes of regional and income inequality, as well as the fear of economic uncertainty, is depicted in the differences between former Prime Minister Koizumi (champion of economic reform) and current PM Fukuda (described as pro-working people). Ichiro Ozawa's changing positions over time are also highlighted. (ECON: Marc Dillard)

¶13. (SBU) Osaka Labor Unions Press Wage Hikes, Back Opposition Candidate at New Year Party

The umbrella labor organization Rengo, the Japan Trade Union Confederation, held a well-attended gathering on January 8 attended by DPJ leaders and Lower House hopefuls, and even a couple of lower level Komeito members.

Rengo predicted an active shunto negotiation in the spring in addition to the union's active election support activities for opposition candidates. For further details please see the attached SBU report. (Osaka-Kobe: Phil Cummings/Hideo Shibuya)

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¶14. (SBU) Parties Vie for Labor Vote; Labor Leader Sees Ambassador

Prime Minister Yasuo Fukuda, Democratic Party of Japan (DPJ) leader Ichiro Ozawa, and other political leaders traded barbs as they greeted labor and business leaders attending the Japanese Trade Union Confederation (JTUC-Rengo) New Year's reception January 7.

PM Fukuda's remarks were self-deprecating, but they contained a clear message. The labor movement is not enemy territory, he said, and he expressed the strong desire to work with the DPJ and other parties to accomplish "good things." See Tokyo 67 for more detail.

See also 07 Tokyo 5620 for a read-out of JTUC-Rengo President

Takagi's courtesy call on Ambassador Schieffer, including Takagi's views on opposition leader Ozawa, Japan's pension problems, and cooperation between Japanese labor and the United Auto Workers. (ECON: Marc Dillard)

¶15. (SBU) Osaka Business Leaders Set Goals for 2008, Look West

In various New Year's gatherings in Osaka in January, business organizations and economic bureaucrats spelled out their goals for the New Year and areas for concern in the Japanese economy.

Asia remains an overwhelming focus for new and ongoing business activities -- with hardly a reference to the United States, outside of the weak dollar and the continuing sub-prime loan problem and its deleterious effects on global finance and American demand for Japanese exports.

Businesspeople blamed rising oil prices for growing price pressure (although the "I word" itself was studiously avoided) and lower domestic consumption in western Japan. Some taxpayer organizations and chambers of commerce called for a reduction in corporate taxes, a streamlining of the tax code, and more public support for economic organizations.

METI Kinki (Osaka) hoped for stronger supplier relationships between Boeing and Higashi Osaka aerospace manufacturers. That city is already home to at least one major factory affiliated with Boeing. The Kansai Economic Federation (Kankeiren) and METI signaled an emphasis on improving the regional infrastructure in order to transform the area into an air, land and sea hub for international trade.

Another interesting topic was the inclusion of Russia in manufacturers' Asia strategy. Many Japanese electronics and automotive manufacturers have begun to build production facilities in Russia. Kankeiren singled out Russia for inclusion in an Asia-Pacific research center it hopes to establish in downtown Osaka over the next several years as part of the Kita Yard development.

All speakers were unanimous in stating that they did not expect 2008 to be nearly as good a year for business as 2007 was, predicting a short-range economic downturn. (Osaka-Kobe: Phil Cummings)

¶16. (SBU) Kansai Business Leaders Avoid Supporting Osaka Gubernatorial Candidates

In a recent press conference, Kansai Keizai Doyukai Co-Chair Atsushi Kojima said it is not decided who the company will endorse in the Osaka governor election.

Although Kansai economic organizations have historically supported candidates from the ruling party, many business people are not enthusiastic about LDP candidate Toru Hashimoto.

Kansai Economic Federation Chairman Hiroshi Shimoizuma publicly declared Kankeiren would like to remain "neutral."

Osaka Chamber of Commerce and Industry (OCCI) Chairman Akio Nomura said in his press conference he prefers the manifesto of DPJ candidate Sadatoshi Kumagai, who has a stronger connection to the local business community through his brother Nobuaki Kumagai, Chairman of Osaka 21st Century Association, an NPO linking local governments and business organizations in several

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development projects.

Kumagai's manifesto includes more support for SMEs and measures aimed at revitalizing the Osaka economy than Hashimoto's statement. Nonetheless, OCCI as an organization has avoided offering tangible support for any single candidate. (Osaka-Kobe: Phil Cummings/Naomi Shibui)

¶17. (U) Wheat Price Hikes

Surging world grain prices may translate into more price hikes in the grocery store in Japan. According to press reports, the Japanese government plans to raise the price it charges to flour mills for wheat by at least 20 to 30 percent in April. World wheat prices have about doubled in recent months. The GOJ increased prices in October by 10 percent, which set off similar hikes in prices for staples such as pasta and bread.

The government's involvement in setting prices stems from a tender system in place in Japan for wheat, in which it acts as a monopsony, buying from overseas and selling to the local flour mills after applying high mark ups. The government uses the profits to subsidize domestic wheat producers, who account for about 10 percent of the 6.2 million tons per annum that Japanese consume.

There are some 86,000 farms in Japan which produce at least some wheat and they are a powerful political force. According to an Asahi report last month, the Finance Ministry has advocated increasing wheat prices to raise more revenue as subsidy costs increase with expanding domestic production.

Japanese Trading company officials have complained to us that the GOJ should relax its control over wheat imports. They say the simultaneous buy-sell system stunts not only domestic consumption, but also the development of commercially viable wheat producing farms in Japan. (Econ: Ryoko Nakano)

18. (U) Patent Prosecution Highway Shifts into Gear

The U.S. and Japan began full-time implementation of the Patent Prosecution Highway (PPH) as of January 4. Following an 18 month pilot, both sides agreed on the usefulness of this framework.

The PPH is expected to reduce costs for applicants, increase efficiency in patent processing, and even improve patent quality. This expanding program will also include the UK and Korea, with Germany and Australia possibilities to join in the near future.

Another recent development in international patent cooperation, the U.S., Japan and European patent offices agreed in November to adopt a common patent application format, which should simplify the process for applicants and increase information sharing between offices. (ECON: Scott Smith)

----- MACROECONOMIC CONDITIONS -----

18. (U) Core CPI Up 0.4% in Nov, Largest Increase since March 1998

Japan's nationwide core CPI, which excludes perishable food items, rose 0.4 percent in November from the previous year, the largest year-to-year increase since March 1998 and the second consecutive monthly y/y advance, the Ministry of Internal Affairs and Communications (MIC) announced December 28. Overall CPI was up 0.6 percent in November from a year earlier, the strongest y/y increase since September 2006. The MIC attributed the November rise in overall CPI to higher energy and food prices. Please refer to the attached for more details. (FINATT: Shuya Sakurai)

19. (U) Recent Major Economic Indicators (U)

The Cabinet Office left its overall economic assessment unchanged, saying that "the economy is recovering, while some weakness has been seen recently."

The monthly economic report, submitted to the Cabinet on

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December 18, indicated that Japan's economy has continued to

expand for 71 months, building on what is a postwar record. However, the report noted the outlook for the economy remains uncertain, as the improvement in corporate profits appears to be pausing due largely to rising energy and raw material costs.

On the other hand, the Bank of Japan report released on December 20, downgraded its economic assessment for the first time since November 2004, indicating that the economy is "expanding moderately as a trend, although the pace of growth seems to be slowing due to the drop in housing investment."

The BOJ said that personal consumption has been firm in a situation where household income has continued to rise moderately.

The BOJ also said that exports and production have continued to increase, while both housing and public investment has been weak.

Please refer to the attached document for detailed analysis and data. (FINATT: Shuya Sakurai)
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FOREIGN AID

120. (U) GOJ Pledges More Aid to Africa

During a speech in Tanzania January 4, Foreign Affairs Minister Komura announced several Japanese aid initiatives for Africa, including \$264.5 million for humanitarian and peace building purposes on the continent and \$200,000 for domestic refugees in Kenya.

According to MOFA Second Africa Division official, Hirotaka Matsuo, these funds had already been allocated in the fiscal 2007 budget. On January 5, Minister Komura and Tanzanian Minister for Foreign Affairs and International Cooperation Membe signed an agreement for the GOJ to provide \$5.6 million for the National Strategy for Growth and Reduction of Poverty of Tanzania (MKUKUTA) and \$6.3 million in rice.

Media reports speculate that the GOJ's generosity is driven by rivalry with China in a race for natural resources and by the quest for votes for a UN Security Council seat.

Former Prime Minister Mori is scheduled to attend the African Union Summit in Addis Ababa where he will encourage participation in the Tokyo International Conference on African Development (TICAD) in May. (ECON: Sally Behrhorst/Eriko Marks)

INVESTMENT

121. (SBU) Matsushita Invests 300B Yen in New LC Panel Plant in Himeji, Hyogo Prefecture

Matsushita Electric is mulling construction of a new LC panel plant tie-up with Canon and Hitachi in Himeji City, one of the sites being considered for a large new LCD investment by Sharp.

Matsushita, the current Japanese front-runner in plasma TV production, is facing greater competition from LCD manufacturers due to technological gains in LCD sets and price cuts in plasma TVs.

Therefore, Matsushita is adapting its strategy to focus on both plasma and LCD technology. Although still not decided in final, Himeji would offer Matsushita easy access to corporate headquarters in Osaka, its Plasma Display Panel plants in Amagasaki, and shipping facilities. (Osaka-Kobe: Phil Cummings/Naomi Shibui)

122. (SBU) "Boot Camp" Marketer Reaps Incentives from Opening Hokkaido Call Center

Buoyed by sales of over 1.5 million "Billy's Boot Camp" exercise DVDs among other products, Nagoya-based, American-

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owned Oak Lawn Marketing's 2007 revenues in Japan were about \$360 million, Oak Lawn President Harry Hill told us January 9.

Oak Lawn has undergone rapid expansion in recent years and now employs about 960 staff in Japan, including both white collar workers and call center operators, and purchases about 4,100 hours of television time per month around the country.

Hill explained how incentives from the Hokkaido government were instrumental in convincing Oak Lawn to establish a call center, its second, in Sapporo.

The call center, which has about 450 staff, opened in November 2006, but under the terms of Oak Lawn's agreement with Hokkaido, the center needed to maintain certain employment benchmarks over twelve months of operations before the incentives were paid.

Having kept employment at agreed levels, Hill said Oak Lawn will now receive a payment of about 200 million yen (about \$1.8 million) in March.

While Oak Lawn's investment is a positive one for Hokkaido, it is not as large as other incentive recipients' contributions to the regional economy have been, and it will be interesting to see the local reaction when figures are made public at the end of the fiscal year in March. Last year Hokkaido paid out 2.46 billion yen in subsidies to attract new employers. (Nagoya: Dan Rochman/Donna Welton)

123. (U) Steadily Increasing Numbers of Tourists Attract Hotel Construction to Okinawa

In order to exploit the steadily increasing numbers of tourists visiting Okinawa, foreign and Japanese companies have begun taking an interest in the island's tourism industry.

According to a recent survey by The Okinawa Development Finance Corporation (governmental financial institution), 24 new hotels, comprising a total of 3,954 new rooms, are set to open in Okinawa over the next five years. The total investment amount for these projects is 125.7 billion yen (about \$1.14 billion) more than double the previous five years.

At least 13 additional hotels with 4,484 rooms, worth 199.6 billion yen (about \$1.81 billion) are in the initial planning stages, while another 15 new hotels containing 2,274 rooms worth 91.9 billion yen (slightly less than a billion dollars) have gone as far as the design phase.

The total investment amount of these additional 52 hotels could total 420 billion yen (nearly \$40 billion). About 70 percent of total investment funds will reportedly come from outside of Okinawa. (NAHA: Thomas M. Kreutzer/Akinori Hayashi)

ENERGY

124. (U) Japanese Trade with GCC Booming

One positive side effect for Japan of recent sky-high oil prices appears to be growing Japanese exports to the Gulf Cooperation Council (GCC) states. A recent JETRO study shows Japanese exports of transportation equipment to the GCC members up by 19.8 percent in the first half of 2007 over the first half of 2006. Exports of general machinery ballooned 114 percent in the same timeframe.

Japan relies on GCC nations for more than 80 percent of its oil with the top three suppliers being Saudi Arabia (35.3%), UAE

(34.5%) and Qatar (15.8%). METI Minister Amari will visit the UAE for three days beginning January 11 to enhance economic relations and energy cooperation. (ECON: Sally Behrhorst)

TECHNOLOGY

125. (U) Taking Cue from Queen Elizabeth, PM Fukuda Issues YouTube New Year's Message

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Prime Minister Fukuda, perhaps hoping to give his cabinet a more "international" flavor, issued a New Year's greeting to the world (in English) on YouTube.

In it, he described Japan as "on the brink of a new era" of reform and said his country's "mission in the world" was to use its scientific and technological skills to help tackle global challenges such as poverty, environmental destruction, and international terrorism. The full message can be viewed here. (ECON: David DiGiovanna)

126. (SBU) Mitsubishi Heavy Industries clarifies Nikkei's H2A Rocket 30% cost reduction story

Senior staff at Mitsubishi Heavy Industries (MHI) Nagoya Aerospace Systems told us the Nikkei Shimbun's January 7 front page article that MHI would reduce the cost of the future H2A rockets by 30 percent was inaccurate.

The Tokyo MHI staff member who was the source of the article told a Nikkei Shimbun reporter that it would be necessary to lower the cost per launch to 7 billion yen (approx. \$64 million) or so in order to be competitive in the international satellite business, but MHI does not have a concrete plan yet.

MHI meant to say that they would have to ask the GOJ to share some other costs (as is done in other countries including on the Ariospace program) such as flight route control software to achieve the cost reduction goal, while MHI continues to work to lower manufacturing costs. MHI took over the rocket launching business from the GOJ last April, and it remains far from profitable. (Nagoya: Tamiki Mizuno)

127. (SBU) MAFF, Biotech Firms in Sync?
Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) and major agricultural biotechnology companies (BASF, Bayer, Dow, DuPont, Monsanto, and Syngenta) recently came to a written 'understanding' of how to prevent future problems with asynchronous approvals.

The section of MAFF dealing with biotech feed approvals is behind the deal but the 'understanding' has broader implications. In conjunction with recent U.S. producer and industry "stewardship" policies, MAFF now believes it can hold biotech companies to a higher standard. MAFF plans to use the document to ensure that new biotech events receive full approval in Japan before being released to U.S. farmers for planting.

MAFF pushed for the "understanding" in the wake of this year's late approval of MIR604 corn. Although intended to prevent disruptions in the corn trade, the "understanding" highlights the gatekeeper role that MAFF and other Japanese regulatory agencies have on the introduction of new biotech crop varieties in the United States. For more information, please see, GAIN Report Number: JA7077 from 12/28/07 (FAS: Paul Spencer)

SPORTING NEWS

128. (U) Asashoryu Back in the Sumo Saddle

Grand champion Asashoryu returned from sumo exile on January 8,

crushing fellow yokozuna Hakuho at a practice session ahead of the New Year Grand Sumo Tournament in Tokyo.

Asashoryu is making a comeback after being banned from participating in two tournaments for skipping a regional exhibition tour claiming injury, but later being caught on camera playing in a charity soccer match in his native Mongolia.

The sumo bad boy is much admired for his wrestling prowess, but sumo purists criticize his apparent lack of regard for the sports' traditions.

Asashoryu defeated Hakuho in 5 of 7 practice bouts. Summing up their match, Hakuho sagely stated, "(Asashoryu) is strong."
(ECON: Sally Behrhorst)

129. (SBU) THIS WEEK'S CABLES

Tokyo 5678 Sub Cabinet Meetings, Dec. 6-7, U.S. Urges More

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Ambitious Economic Engagement

Tokyo 5679 Japan/Beef: Nobody Ready for OIE Standards

Tokyo 5680 Iwakuni Mayor Resigns, Seeks New Mandate

Tokyo 0022 PM Fukuda China Visit: Taiwan, East China Sea, Environment Figure Prominently

Tokyo 0024 Japanese Aviation Liberalization--A Lot of Talk

Tokyo 0034 Climate Change: Japanese Ministries Ready to Move Forward

Tokyo 0067 Parties Vie for Labor Support

Tokyo 0071 Japanese Views of Situation in Pakistan

Nagoya 0001 G. Communication Chair Comments on Nova Acquisition

130. (U) This SENSITIVE BUT UNCLASSIFIED e-newsletter from U.S. Embassy Tokyo's Economic Section, with contributions from the consulates, is for internal USG use only. Please do not forward in whole or in part outside of the government. The Scope is edited this week by Charlotte Crouch (CrouchCA@state.gov). Please visit the Tokyo Econ Intranet webpage for back issues of the Scope. Apologies, this option is only available to State users. Please contact Joy Progar (ProgarJ@state.gov) if you are from a different agency and are interested in a back issue.
DONOVAN